IT Leaders Meeting
November 18, 2005 1:30-3:30
1001 I Street, Sacramento, California
CAL EPA Building, Coastal Hearing Room

Welcome   **Clark Kelso**
> http://www.cio.ca.gov/leaders.html Agenda

Executive Institute   **Carol Fieldhouse**
> http://www.cio.ca.gov/leaders.html Attachments / EI Agenda

CIO Updates   **Clark Kelso**
- **Ca IT Strategic Plan**
  http://www.cio.ca.gov/StrategicPlan.html 2005 Plan

- **Portal Steering Committee 10/14/05 Adopted Recommendations**
  http://www.cio.ca.gov/leaders.html Attachments / Recommendations end agenda

- **Identity, Authentication, Privacy Segment**
  http://www.cio.ca.gov/leaders.html Agenda

- **2007 Daylight Time Change Legislation IT Impact**

DTS Update   **Bob Austin**

Enterprise Architecture   **Steve Clemons**
> http://www.cio.ca.gov/ITCouncil/Committees/ArchStandards.html

HR Committee & MAP-IT Team Effort   **Mitch Coppin**
> http://www.cio.ca.gov/leaders.html *A*ttachments
> http://www.spb.ca.gov/employment/eligible_list_disclosure.htm

Strategic Sourcing   **Terese Butler**
> http://www.cio.ca.gov/leaders.html Agenda

IT Security   **D Reiger &John Lane**

Section 508 Training   **Gigi Smith**

Closing   **Clark Kelso**

- **Invitation to *Best of Ca Event: December 15***
  http://www.govtech.net/gtc/index.php/BestofCalifornia2005

- **Next IT Leaders Meeting: February 24, 2006**

- **VISIT www.cio@ca.gov for all meeting supporting documentation**

- **2006 Scheduled Meetings follow for your calendar**

IT Leaders 2006 Quarterly Meetings:

Date	Time	Location
February 24	1:30 to 3:30	1001 I Street, CAL EPA Building, Coastal Hearing Room
May 26	1:30 to 3:30	1001 I Street, CAL EPA Building, Coastal Hearing Room
August 25	1:30 to 3:30	1001 I Street, CAL EPA Building, Coastal Hearing Room
November 17	1:30 to 3:30	1001 I Street, CAL EPA Building, Coastal Hearing Room

**State Portal Steering Committee
Recommendations – October 14, 2005**

The California State Information Technology Strategic Plan, as proposed to be updated effective November 2005, directs the California Portal Steering Committee to complete the following actions, the purpose of which is to establish "an enabling management and technical foundation for the transformation of government, making the technical solution implementation process more customer-focused, strategic, efficient, and economical":

> "The California Portal Steering Committee will guide development of a new State Portal including: (a) identification and design of shared services; (b) definition of the technical architecture and governance process; (c) identification of additional projects to leverage shared resources; and (d) by July 2006, approval of the first architecture for the state portal."

At its most recent meeting on October, the Portal Steering Committee made the following recommendations regarding development of a new State Portal:

Recommendation 1 (Governance & Architecture): The State should adopt a "federated" management and governance approach to the development and maintenance of the State's Internet presence.

In general, the State's Internet presence should be developed and maintained by staff who are closest to the programs that own the information to be presented on the web or that have regulatory responsibility for transactions to be processed on the web. This is, in fact, the way the State's presence on the Internet has developed over the last decade, with only limited exceptions, and there is no compelling reason to alter this basic approach. To the contrary, there is every reason to think that sustainable Internet development can take place only if the responsibility for development and maintenance lies close to the personnel responsible for each program that is represented on the Internet.

While most development and management should occur at the departmental level, there are a few functions that are common to most agencies where there are significant benefits to be achieved from adopting a shared services architecture (e.g., Identity and Authentication Services, Payment Processes, Collections Management, Hosting Services). In a shared services environment, a few individual departments would be assigned responsibility for developing and maintaining one or more of the shared services and making sure that those services are available to all other departments. A shared services architecture can function effectively and smoothly only if there is a general State

web enterprise architecture that defines at a high level how individual departmental web sites can interoperate with the shared services.

In sum, for the development and maintenance of its web presence, the State should adopt a "federated" management and governance structure in the context of a web enterprise architecture that leverages shared services across the Executive Branch.

Recommendation 2 (Service Centers): With leadership provided by cross-agency working groups organized around a few high-level governmental functions, the State should develop and maintain one or more "Service Centers" (including a State-level "California Service Center") that assist users in navigating quickly to desired government information and services.

The IT industry's adoption of the phrase "portal" has created substantial confusion. It is not at all clear exactly what a "portal" is or is supposed to do. It is time to bring plain language back to the table so everyone can understand what is intended.

To some people, the word "portal" has signified the development of a single web-hosting and development environment where all of an organization's web pages are maintained. The California State Portal, in its initial design and implementation, seemed to suggest this approach. The federated management and governance approach recommended above largely rejects this meaning of the word "portal."

More commonly, the word "portal" simply refers to a set of web pages and links that assists users in finding desired information or services on a purely functional and customer-oriented basis even though the user may not know anything about the way an organization is organized. Most of the links and information on the California home page and related pages fall into this category. The idea is that users could come to one web site, www.ca.gov, and easily find anything they needed or wanted from State web pages with just a few clicks of the mouse.

In essence, these type of web pages function as a "service center" which connects users to all other State web sites dealing with specified subject matters. These pages serve a function quite similar to a call center or help line where customer service representatives can help guide callers through the bureaucracy. Given the size, scope and complexity of state services, there remains a need for "service centers" to help guide users through the "Internet bureaucracy."

The implementation of this concept is likely to require several levels of "Service Centers." For many users, a "California Service Center" available at www.ca.gov will still have great value. We will also need service centers for certain common governmental functions or operations (e.g., "California Taxes Service Center" or

"California Health Service Center"). These categories are already reflected on www.ca.gov, so it should be relatively easy to identify initially some groupings of departments to develop and maintain these second-tier service centers.

Recommendation 3 (Shared Services): The State CIO should begin conversations with the State Portal Review Board and appropriate agencies to identify specific shared services that should be developed for the State's web presence. The list of specific shared services should be brought back to the State Portal Steering Committee for its consideration and action.

Implementation of the shared services architecture will require the commitment of significant departmental resources by departments that are assigned the responsibility of developing and maintaining shared services. This can be accomplished only after discussions with specific departments to determine which departments are both willing and capable of taking on enterprise-wide responsibilities.

Before these departmental decisions and commitments can be made, we need to identify a preliminary list of shared services that must be developed on a priority basis. The State CIO should take the initial responsibility for preparing a proposed list of such shared services, in consultation with appropriate stakeholders.

Recommendation 4 (State Banner): The State CIO, with advice from the Portal Steering Committee, should adopt a new banner for State web pages that uses less space and facilitates co-branding with State agencies and departments.

Compared to corporate Internet branding and industry best practices, the current State banner uses too much space on every web page, distracts users from more important information on the page and can leave users confused about where they are on the State's web pages. The State banner should be revised so that it more simply and directly brands a page as a state web site without otherwise interfering with the presentation of information or services on the page.

The existing branding includes more than just the banner. It includes very structured look-and-feel requirements. The State CIO has authorized the Franchise Tax Board and the Office of Emergency Planning within the Department of Health Services to redesign their web pages to be more customer-centric without the limitations imposed by the existing look-and-feel requirements. Once these departments have finished their redesign efforts, the Portal Steering Committee will be in a better position to reconsider the existing look-and-feel requirements. Until such time as that reconsideration has taken place, all other departments should continue to observe the existing look-and-feel requirements.

Recommendation 5 (Transition Planning): Planning to transition away from the existing State Portal hardware and applications should begin immediately in anticipation of the federated, shared-services architecture recommended above. Current clients and agencies which rely upon that existing hardware and applications infrastructure should begin appropriate transition planning with the assistance of the Department of Technology Services.

The current State Portal hardware and applications, though an award-winning improvement in the State's Internet presence when initially designed five years ago, has proven to be unsustainable and unmaintainable given the resources available to us. Its technical architecture is too complex and difficult to maintain over time.

There are only a small handful of customers that take full advantage of the State Portal's web hosting services. They are as follows:

- California Film Commission
- Commerce & Economic Development Program
- First Lady's Office
- Governor's Office
- I-Bank
- MyCalifornia
- Office of HIPPA Implementation
- State CIO
- Tourism

The State Portal has failed to attract new customers to its hosting services, and several of the customers listed above are already working on standing up their own web sites.

The State Portal offers a few other services, including a web search tool, a survey system, an email and wireless alerts system, and an Amber Alert notification system. Of these services, the only one used by a substantial number of departments is the search tool, and there is widespread agreement that the search tool does not work very well as an effective finding tool (particularly when compared with other widely available web searching tools). Many of these enterprise-wide functions will have a place in the shared services architecture described above, but the particular implementation that we now have, no longer serves the State's needs.

Accordingly, departments that rely upon the existing hardware and application infrastructure for their web hosting should begin transition planning with the guidance and assistance of the Department of Technology Services.